CalPM Business Office						
	S OTTIC	ce				
Date:						
Event:		Phase I End User Training				
Time:						
Lunch:						
Location:						
		Objective				
Objective:						
DAY 1						
8:30-4:30						
Estimated						
Start/End Time		Topic	Notes			
		·				
8:30 - 9:00	Avatar Basics					
	Log	ging In and Out				
	Nav	rigation of Home View				
	Му	Forms				
		nts Widget				
		rigation of Chart View				
9:00 – 10:00		Client Management/Episode Management				
	MH	Admission Bundle				
		CSI Admission-SKIP				
		Diagnosis				
		Sexual Orientation and Gender Identity (SOGI) SKIP				
		O Admission Bundle				
		Diagnosis				
		Sexual Orientation and Gender Identity (SOGI) SKIP				
		nt Update Bundle				
		Update Client Data				
	Discha	Financial Eligibility				
	Client	_				
		up Entry				
		up Entry (edit)				
10:00 – 10:15	Break					
10:15 – 12:00	PM - 0	Client Management / Account Management				
		ial Eligibility				
	Guara	ntor/Payor .				
	Custor	mize Guarantor				
	l	iability Update				
	Real T	ime Inquiry (270) Request				
	(Client Ledger				
	Reviev	v MEDS Information				
	Reviev	v MEDS Information Report				
	UMDA	AP				

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, -	
Client Payment Agreement	
Lunch	
Review	
PM – Services / Ancillary / Ambulatory Services	
Client Charge Input	
Edit Service Information	
Spreadsheet Edit Service Information	
Claim Follow-up	
Delete Services	
Delete Services (Open Services Only)	
Practitioner Only Service Delete	
Break	
Re-cap / Q&A	
DAY 2	<u> </u>
8:30-4:30	
Topic	Notes
Review from Previous Day	
PM – Billing / Remittance Processing	
Individual Cash Posting	
Spreadsheet Remittance Posting	
Quick Individual Cash Posting	
—Payment by Posting Date	
Break	
PM – Billing/Remittance Processing	
continued	
Lunch	
Review	
PM – Billing / Billing Reports / Crystal Reports	
Open Claims Report	
Payment/Adjustment Report	
Payment by Posting Date Report	
Active Receivables	
Claim Follow-up Report	
Share of Cost Report	
AR Daily Posting Verification Payment Onl	
Client Face Sheet (MHS140)	
Detailed Aging Report	
Insurance Policy Approval Report (PSP177)	
DBH Payments and Adjustments Report	
Aged Accounts Report	
Unapplied Client Payments (PSP143)	
	Lunch Review PM - Services / Ancillary / Ambulatory Services Client Charge Input Edit Service Information Spreadsheet Edit Service Information Claim Follow-up Delete Services Delete Services (Open Services Only) Practitioner Only Service Delete Break Re-cap / Q&A DAY 2 8:30-4:30 Topic Review from Previous Day PM - Billing / Remittance Processing Individual Cash Posting Spreadsheet Remittance Posting Quick Individual Cash Posting —Payment by Posting Date Break PM - Billing/Remittance Processing continued Lunch Review PM - Billing / Billing Reports / Crystal Reports Open Claims Report Payment by Posting Date Report Active Receivables Claim Follow-up Report Share of Cost Report AR Daily Posting Verification Payment Onl Client Face Sheet (MHS140) Detailed Aging Report Insurance Policy Approval Report (PSP177) DBH Payments and Adjustments Report Aged Accounts Report

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	MHS 234 Monthly Cash Received (MHS234)	
	Client Account Ledger (MHS147)	
	MHS 161 Client Account Ledger	
2:30 – 2:45	Break	
2:45 – 3:30	PM – Billing / Billing Reports / Ad Hoc Reports continued	
3:30 – 4:00	Review	
4:00 – 4:30	Wrap Up	

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